Practice Management Suite

Tool Reference & Data Source Guide

A summary of each tool in the suite — what it analyzes and where to find the data file it needs. All tools process files entirely in your browser; no data is uploaded to any server.

📊 Chiropractic KPI Dashboard

WHAT IT DOES	Uploads one or more 835 EDI remittance files and instantly calculates your clinic's core financial KPIs: collection rate, revenue per visit, write-off percentage, and payer mix. Monthly trends are charted automatically so you can spot seasonal patterns or billing issues at a glance. Results are benchmarked against chiropractic industry standards and can be exported to Excel or PDF.
DATA SOURCE	In your clearinghouse portal (Office Ally, Availity, Waystar, Change Healthcare, etc.), navigate to Remittance, ERA, or 835 Reports, select your date range, and download in EDI/835 format — not PDF or summary view. The file will end in .txt, .835, or .x12.

📋 835 Remittance Parser

WHAT IT DOES	Converts raw ANSI X12 835 EDI files into clean, structured spreadsheets that are actually readable. Each claim, service line, adjustment code, and payer/payee detail is extracted into separate columns. Multiple files can be dropped in at once and are automatically merged — useful when your clearinghouse splits remittances by date or payer.
DATA SOURCE	Same 835 EDI file as the KPI Dashboard: download from your clearinghouse in EDI/835 format (.txt, .835, or .x12). Multiple files from different date ranges can be combined in one session.

📊 Sales Report Analysis

WHAT IT DOES	A deep-dive analyzer built specifically for Jane's Sales Report export. It pairs C# (insurance) and P# (patient) invoices into unified visit rows, computes gross billed, write-offs, payer mix, and revenue quality by provider. Additional tabs break down ICD-10 diagnosis codes, CPT billing codes by staff member, and visits with zero payment received that may need follow-up.
DATA SOURCE	In Jane, go to Reports → Sales. Set your date range and click Export (top right), saving as CSV. Use the full Sales report — not the Payments or Invoices sub-report — as this is the only export that includes the Patient, Staff Member, Payer, Subtotal, Collected, and Balance columns the tool needs.

💼 Compensation Analyzer

WHAT IT DOES	Breaks down each practitioner's compensation report into procedure-level detail: how many of each appointment type were delivered, gross billed, amounts collected from insurance vs. patients, commission totals, and payment method splits. It also surfaces patient retention patterns and schedule utilization so you can assess each provider's overall practice contribution.
DATA SOURCE	In Jane, go to Reports → Compensation. Choose your date range and select the staff member(s) — or run for all staff at once, since the tool separates them automatically. Export as CSV.

🔬 Meta-Analysis Dashboard

WHAT IT DOES	The most comprehensive tool in the suite. It merges your 835 EDI file and Jane Sales CSV simultaneously to build a single unified picture of each patient visit — combining insurance-side data (charges, write-offs, paid amounts, denial codes) with the patient-side view (collected, outstanding balance, treatment type). Multi-provider visits are automatically consolidated. Tabs cover payer mix, provider performance, procedure codes, denial management with CAS reason codes, and a cross-source reconciliation report that flags visits where the two sources disagree.
DATA SOURCE	Requires both files at once: the 835 EDI remittance file from your clearinghouse and the Jane Sales CSV export from the same billing period. Date ranges should match as closely as possible — even a few days of mismatch can cause reconciliation gaps in the report.

📅 Appointments Analytics

WHAT IT DOES	Analyzes your appointments export to produce attendance and scheduling intelligence. Key metrics include total visits by provider, no-show and cancellation rates, treatment type mix, unsigned chart counts, and daily schedule averages. All breakdowns are available by individual provider using a tab selector, making it easy to compare performance across your team or review a single practitioner.
DATA SOURCE	In Jane, go to Reports → Appointments. Set your date range, choose All Staff or a specific provider, and Export as CSV or XLSX. Make sure the export includes the Status column (Arrived, No Show, Cancelled) — this is what drives the attendance and no-show calculations.